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FinancialPlanning

Wealthtech Weekly

July 3, 2025

By Rob Burgess
Reporter

Nate Byers is sole owner of Calculated Wealth, an RIA in Madison, Wisconsin, and he works with three other advisors across the Midwest in Minneapolis, St. Louis and Cincinnati. In the latest edition of "Show Me Your Stack," he told me what gives him comfort with the spread-out workforce is a tech stack designed with cybersecurity at the top of mind.

Have you optimized your tech stack for cybersecurity? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

SHOW ME YOUR STACK

How to buy peace of mind with cybersecurity tech: Show Me Your Stack

With a geographically spread-out workforce, Nate Byers of Calculated Wealth recognized the need to invest in defensive measures to keep client data safe.

- **How advisors can reduce estate planning conflicts in 4 steps**
  Lack of communication can breed conflict, but offering an outside perspective can smooth over family conflicts.
- **How tech for better meetings could turn advisors 'superhuman'**
  Aaron Klein, former Nitrogen CEO, seeks to disrupt the market for AI note-takers.
- **Volatility breeds interest in fixed-income stability**
  The baby boomer generation is now in the retirement phase, and many clients want more predictable income and less of a roller coaster with their nest egg.
- **As access to alts expands, here's why some advisors remain cautious**

They can be illiquid, pricey and opaque, and some advisors say the performance doesn't justify the hype. Others say the assets can offer meaningful advantages.

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PARTNER INSIGHTS FROM EMONEY

Asking the right questions is at the heart of every meaningful financial conversation

How do you know what to ask and when? This webinar will guide financial professionals through a three-part journey.

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